

U.S. House of Representatives
Committee on Ethics

LEGISLATIVE RESOURCE CENTER

EMPLOYEE POST-TRAVEL DISCLOSURE FORM

18 MAR 20 AM 11:06

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual Financial Disclosure Statements of those employees required to file them. In accordance with House Rule 25, clause 5, **you must complete this form and file it with the Clerk of the House, 135 Cannon House Office Building, within 15 days after travel is completed.** Please do not file this form with the Committee on Ethics.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: Machalagh Carr
2. a. Name of accompanying relative: _____ or None ☒
b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates of departure and return: Departure: 2/22/2018 Return: 2/24/2018
b. Dates at personal expense (if any): _____ or None ☒
4. Departure city: Washington, DC Destination: Ft. Lauderdale Return city: Washington DC
5. Sponsor(s) (who paid for the trip): Information Technology and Innovation Foundation
6. Describe meetings and events attended: Healthcare, trade, and technology innovation discussions including discussions on cyber security at the conference site, hosted by ITIF and experts in the field
7. Attached to this form are EACH of the following (signify that each item is attached by checking the corresponding box):
 - a. ☐ a completed Sponsor Post-Travel Disclosure Form;
 - b. ☐ the Primary Trip Sponsor Form completed by the trip sponsor prior to the trip, including all attachments and Grantmaking or Non-Grantmaking Sponsor Forms;
 - c. ☐ page 2 of the completed Traveler Form submitted by the employee; **and**
 - d. ☐ the letter from the Committee on Ethics approving my participation on this trip.
8. a. I represent that I participated in each of the activities reflected in the attached sponsor's agenda. (Signify that statement is true by checking box): ☒
b. If not, explain: I did not attend the last dinner discussion as my flight left prior to that event beginning.

I certify that the information contained on this form is true, complete, and correct to the best of my knowledge.

SIGNATURE OF TRAVELER: [Signature] DATE: 3/19/2018

I authorized this travel in advance. I have determined that all of the expenses listed on the attached Sponsor Post-Travel Disclosure form were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

NAME OF SUPERVISING MEMBER: Kenn Brady DATE: 3/19/18

SIGNATURE OF SUPERVISING MEMBER: [Signature]

U.S. House of Representatives
Committee on Ethics

TRAVELER FORM

1. Name of Traveler: Machalagh Carr
2. Sponsor(s) (who will be paying for the trip): Information Technology & innovation Foundation
3. Travel destination(s): Fort Lauderdale
4. a. Date of departure Feb 22, 2018 Date of return: Feb 24, 2018
- b. Will you be extending the trip at your personal expense? ☐ Yes ☒ No
If yes, dates at personal expense: _____
5. a. Will you be accompanied by a relative at the sponsor's expense? ☐ Yes ☒ No
- b. If yes:
- (1) Name of accompanying relative: _____
- (2) Relationship to traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
- (3) Accompanying relative is at least 18 years of age: ☐ Yes ☐ No
6. a. Did the trip sponsor answer "yes" to Question 9(d) on the Primary Trip Sponsor Form (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or foreign agent and you are requesting lodging for two nights)? ☐ Yes ☒ No
- b. If yes, explain why the second night of lodging is warranted:
- _____

7. Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: ☒ Yes ☐ No mc
- NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.

8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. Staff should include their job title and how the activities on the itinerary relate to their duties.

I am the Oversight Staff Director for Ways + Means. The agenda covers trade, IT development and cyber issues - all of which Ways and Means conducts oversight of. mc

9. Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, and/or arranging the trip? ☐ Yes ☒ No

10. FOR STAFF TRAVELERS:

TO BE COMPLETED BY YOUR EMPLOYING MEMBER:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Date: 1/19/18

Kenn Brady
Signature of Employing Member

**U.S. House of Representatives
Committee on Ethics**

PRIMARY TRIP SPONSOR FORM

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer, or employee, who will then forward it to the Committee together with a Traveler Form at least 30 days before the start date of the trip. The trip sponsor should NOT submit the form directly to the Committee. The Committee Web site (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor (who will be paying for the trip): _____
The Information Technology and Innovation Foundation (ITIF) _____
2. I represent that the trip will not be financed (in whole or in part) by a registered federal lobbyist or foreign agent (signify that the statement is true by checking box): ☒ _____
3. Check only one: I represent that:
 - a. the primary trip sponsor has not accepted from any other source funds intended directly or indirectly to finance any aspect of the trip ☒ or
 - b. the trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds ☐ or
 - c. the primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities. ☐If "c" is checked, list the names of the additional sponsors: _____

4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary):
See Attachment 1

5. Is travel being offered to an accompanying relative of the House invitee(s)? ☐ Yes ☒ No
6. Date of departure: 2/22/2018 Date of return: 2/25/2018
7. a. City of departure: Washington, DC
b. Destination(s): Fort Lauderdale, FL
c. City of return: Washington, DC
8. I represent that (check one of the following):
 - a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: ☐ or
 - b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: ☒ or
 - c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event and lobbyist/foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations. ☐
9. Check one of the following:
 - a. I checked 8(a) or (b) above: ☒
 - b. I checked 8(c) above but am not offering any lodging: ☐
 - c. I checked 8(c) above and am offering lodging and meals for one night: ☐ or
 - d. I checked 8(c) above and am offering lodging and meals for two nights: ☐If "d" is checked, explain why the second night of lodging is warranted: _____

10. Attached is a detailed agenda of the activities the House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees) (indicate agenda is attached by checking box): ☒

11. Check one:

a. I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip (signify that the statement is true by checking box): ☒ or

b. N/A – trip sponsor is a U.S. institution of higher education. ☐

12. For each sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip and its role in organizing and/or conducting the trip:

See Attachment 2

13. Answer parts a and b. Answer part c if necessary.

a. Mode of travel: Air ☒ Rail ☐ Bus ☐ Car ☒ Other ☐ (Specify: _____)

b. Class of travel: Coach ☒ Business ☐ First ☐ Charter ☐ Other ☐ (Specify: _____)

c. If travel will be first class or by chartered or private aircraft, explain why such travel is warranted:

14. I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). (signify that the statement is true by checking box): ☒

15. I represent that either (check one of the following):

a. The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees: ☒ or

b. The trip involves events that are arranged specifically *with regard* to congressional participation: ☐

If "b" is checked:

1) Detail the cost per day of meals (approximate cost may be provided): _____

2) Provide reason for selecting the location of the event or trip: _____

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel name: Westin Fort Lauderdale Beach Resort City: Fort Lauderdale, FL Cost per night: \$299

Reason(s) for selecting: Cost, Availability, Ease of Travel from East and West Coasts

Hotel name: _____ City: _____ Cost per night: _____

Reason(s) for selecting: _____

Hotel name: _____ City: _____ Cost per night: _____

Reason(s) for selecting: _____

17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. (signify that the statement is true by checking box): ☐

18. TOTAL EXPENSES FOR EACH PARTICIPANT:

<input type="checkbox"/> actual amounts <input checked="" type="checkbox"/> good faith estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or employee	\$650	\$900	\$450
For each accompanying relative			

	Other Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or employee	\$1000	Waived Registration Fee
For each accompanying relative		

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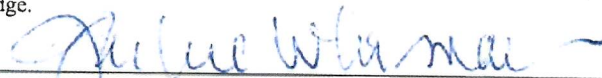
19. Check one:

- a. I certify that I am an officer of the organization listed below. ☐ or
b. N/A – sponsor is an individual or a U.S. institution of higher education. ☐

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☐

21. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature:



Name:

Jackie Whisman

Title:

Vice President

Organization:

ITIF

Address:

1101 K Street, NW, Suite 610, Washington, DC 20005

Telephone number:

(202) 626-5748

Email address:

jwhisman@itif.org

If there are any questions regarding this form please contact the Committee at the following address:

Committee on Ethics
U.S. House of Representatives
1015 Longworth House Office Building
Washington, DC 20515
(202) 225-7103 (phone)
(202) 225-7392 (general fax)

Draft Agenda: 2018 ITIF Winter Policy Retreat

February 22 – 25, 2018

The Westin Fort Lauderdale Beach Resort - 321 North Fort Lauderdale Beach Boulevard

Thursday, February 22, 2018

- 12:50 PM **JetBlue Departure from DCA**
- 3:30 PM **Arrival to FLL**
- 2:00 – 6:00 PM **Registration in Hotel Lobby**
- 6:00 – 7:00 PM **Welcome Reception**
- 7:15 – 9:00 PM **Dinner Discussion: The Future of Health Care Innovation**
Executives from Novartis and Celgene will join ITIF President Rob Atkinson for a discussion of how biologics, big data and nano are revolutionizing the health care industry.

Friday, February 23, 2018

- 8:00 AM **Breakfast Buffet**
- 8:30 – 9:00 AM **Fireside Chat with Vishal Amin, U.S. Intellectual Property Enforcement Coordinator**
ITIF Vice President Stephen Ezell will moderate a discussion on online piracy and what the administration has planned to combat overseas infringement of U.S.-owned IP.
- 9:15 – 10:30 AM **Panel: “Overcoming Europe’s Economic Risk Aversion”**
U.S. economic policy embraces entrepreneurial dynamism, risk-taking, and breakthrough innovations. Europe’s framework is fundamentally different. It is grounded in the precautionary principle—that is, avoiding risks—which in practice means limiting the use of data; over-regulating new technologies (like robots, over-the-top applications, etc.); challenging large firms for the sin of being large (and American); and generally resisting the kind of Schumpeterian creative destruction that is so vital to growth and progress. It would be one thing if this affected only Europe. But other regions, particularly Latin America, are increasingly looking to copy the European model. This panel will discuss the challenges posed by Europe’s overabundance of caution and explore how innovation supporters and the U.S. government can better make their case, both in Europe and to others looking for guidance.
- Moderator: **Rob Atkinson**, President, ITIF
Confirmed: **Paul Hofheinz**, President/Co-Founder, Lisbon Council

Invited: **Damien Levie**, Head of Trade, Embassy of the European Union
Guy Verhofstadt, President, Alliance of Liberals and Democrats for Europe, European Parliament
Ambassador Mariam Sapiro
David Weiner, Deputy Assistant USTR for Europe

Friday, February 23, 2018 (continued)

10:45 – 12:00 PM

Panel: “China Trade: Constructive Confrontation or All-Out Trade War?”

President Trump campaigned on getting tougher on China’s unfair trade practices, and his administration has rightly started to follow through by launching a Section 301 Investigation of China’s policies and practices related to tech transfer, intellectual property, and innovation. But what are the pros and cons of the policy options available to crack down on Chinese “innovation mercantilism?” And what should Congress do to complement or restrain the administration’s China trade policy? This panel will explore these and other questions surrounding America’s most fraught economic relationship and the integrity of the global trading system.

Moderator: **Stephen Ezell**, Vice President, Global Innovation Policy, ITIF
Confirmed: **Hon. Byron Dorgan**, Senior Policy Advisor, Arent Fox
Claire Reade, Senior Counsel, Arnold and Porter
Dennis Shea, Vice Chairman, U.S.-China Economic and Security Review
Tim Wineland, Deputy Assistant USTR for China Affairs
Invited: **Gil Kaplan**, Under Secretary for International Trade Designate
Clete Willems, Special Assistant to the President for Trade

12:00 PM

Lunch

1:00 – 2:15 PM

Panel: “Innovation Companies in the Crosshairs: How Should They Respond?”

More and more, innovation industries are under attack, not just in the United States, but around the world. They stand accused of being monopolists that make excess profits by controlling and abusing of vital chokepoints in the network economy; violating privacy and enabling all sorts of anti-social activities; and destroying jobs. This snowballing narrative poses a major threat to pro-innovation, pro-growth policies around the world. This panel will explore these issues and discuss how advocates for innovation should respond.

Moderator: **Rob Atkinson**, President, ITIF
Confirmed: **Congresswoman Suzan DelBene (WA-01)**
Congressman Darrell Issa (CA-49)

Friday, February 23, 2018 (continued)

- 2:30 – 3:30 PM **Fireside Chat with Everett Eissenstat**, Deputy Assistant to the President for International Economic Affairs and Deputy Director of the NEC (invited)
ITIF President Rob Atkinson will moderate a discussion focused on the Administration's objectives on trade and the economy.
- 3:30 – 4:30 PM **Discussion with FCC Commissioners Jessica Rosenworcel and Mike O'Reilly** (invited)
Senior Telecom Analyst Doug Brake will moderate a discussion focused on net neutrality, 5G, and infrastructure deployment.
- 5:00 – 7:00 PM **Dinner Discussion: "Big Is Under Attack: How to Restore the Reputation of Large Corporations as Forces for Progress and Opportunity"** with ITIF President Rob Atkinson

Saturday, February 24, 2018

- 8:30 AM **Breakfast Buffet**
- 9:00 – 9:30 AM **Opening Remarks**
- 9:30 – 10:45 AM **Panel: "Cybersecurity Analysis"**
High-profile cyberattacks on U.S. companies, government agencies, and even presidential campaigns now seem to be regular occurrences. Some of the perpetrators are state-supported, some are criminal enterprises, and still others are rogue actors. Regardless of the source, these threats undermine support for IT-driven innovation, and there is a growing urgency in Washington to do more to secure the nation's IT systems. What should Congress and the administration do? Among the options are shifting from an offensive posture to a more defensive one, supporting strong end-to-end encryption, and developing a national system of secure identities. This panel will assess the most pressing threats the country faces and explore the path forward.

Moderator: **Daniel Castro**, Vice President, ITIF
Confirmed: **Rick Driggers**, Deputy Assistant Secretary, Office of Cybersecurity and Communications, Department of Homeland Security

Barbara Hoffman, Vice President Global Strategic Operations
Government Vertical

Joan O'Hara, Deputy National Security Advisor to the Vice
President of the United States

Invited: **Chairman Michael McCaul**, U.S. House of Representatives

Saturday, February 24, 2018 (continued)

11:00 AM – 12:15 PM **Panel: “Technology and the Future of Work”**

It seems impossible to go a day without reading how the so-called “fourth industrial revolution,” propelled by technological innovation and relentless automation, will lay waste to jobs and leave people out in the cold. But instead of succumbing to this kind of techno-panic, it’s worth stepping back and questioning the premise. What kind of labor market impacts can we really expect from emerging technologies like artificial intelligence, automation, and robotics? More importantly, what kinds of policies do we need to ensure American workers are better equipped to successfully navigate inevitable economic transitions? And how can supporters of technological innovation win the fight against the “neo-Luddites” and their sympathizers.

Moderator: **Rob Atkinson**, President, ITIF

Confirmed: **James Bessen**, Boston University School of Law
Amit Singh, Senior Vice President, Global Public Policy, Uber
Pamela Tate, CEO, CAEL

Invited: **Reed Cordish**, Special Assistant to the President for
Intragovernmental and Technology Initiatives
James Manyika, Chairman and Director, McKinsey Global
Institute
Eduardo Padrón, President, Miami Dade College

12:30 PM **Lunch Buffet**

1:00 – 2:00 PM **Remarks by Alex Acosta, Secretary, United States Department of Labor**
(invited)

A keynote address by the Secretary followed by a question and answer period.

2:30 – 3:45 PM **Panel: “Advancing U.S. Digital Policy in the Global Arena”**

The United States has pioneered global digital policy on many issues such as Internet governance, digital trade, data protection, online speech, and intellectual property protection. Yet many countries now look to replicate ideas from Europe, rather than the United States, when formulating their own policy initiatives for the digital economy. How should U.S. policymakers

and businesses educate and promote innovation-friendly policies with other countries and ensure continued U.S. digital policy leadership?

5:00 – 7:00 PM

Dinner Discussion on Tech Policy Prospects with Congressional Staff

2017 was an eventful year for technology policy, and 2018 promises to be just as eventful with Congress potentially weighing in on a host of different tech issues, including telecom reform, open government data, copyright, cybersecurity and privacy. A panel of Congressional staff members focused on tech policy will engage in a moderated discussion of what is likely in store for the rest of the 115th Congress.

Confirmed:

- Rachel Appleton**, Rep. Derek Kilmer
- Dustin Carmack**, Rep. Ron DeSantis
- Machalagh Carr**, House Ways and Means Committee
- Josh Connolly**, Rep. Jackie Speier
- Austin Durrer**, Rep. Charlie Crist
- Andy Flick**, Rep. Seth Moulton
- Chapin Gregor**, Senate Commerce Committee
- Tyler Grimm**, Rep. Darrell Issa
- Brad Howard**, Rep. Stephanie Murphy
- Aruna Kalyanam**, House Ways and Means Committee
- Douglas Peterson**, Senate Finance Committee
- Steven Pfrang**, Rep. Darin LaHood
- Lori Prater**, Rep. Mike Kelly
- Ansley Rhyne**, Sen. Marco Rubio
- Curtis Rhyne**, Rep. George Holding
- Tricia Russell**, Rep. Josh Gottheimer
- Aaron Schmidt**, Rep. Suzan DelBene
- Franz Wuerfmannsdobler**, Sen. Chris Coons

Sunday, February 25, 2018

9:25 AM **JetBlue Departure from FLL**

11:50 AM **Arrival at DCA**

